

**Chat Participants:** Nate Barton [REDACTED], Kunnal Vij

[REDACTED], Kunnal Vij [REDACTED]

**Chat Start Date:** 06/01/23, 00:11:29 AM GMT

**Chat End Date:** 06/01/23, 22:06:28 PM GMT

**Service(s):** iMessage

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June 01, 2023

Nate Barton

Are Matt's teams costs in our P&L?

Sent: 06/01/23, 00:11:29 AM GMT

Service: iMessage

Kunnal Vij

They come though allocations as he  
sits under marketing

Sent: 06/01/23, 00:12:01 AM GMT

Service: iMessage

Kunnal Vij

Phil's CC

Sent: 06/01/23, 00:12:07 AM GMT

Service: iMessage

**PLAINTIFF**  
U.S. District Court - NDCAL  
**4:20-cv-05640-YGR-TSH**  
*Epic Games, Inc. v Apple Inc.*  
Ex. No. **CX-0539**  
Date Entered \_\_\_\_\_  
By \_\_\_\_\_

Nate Barton

? They don't sit in services though

Sent: 06/01/23, 00:12:21 AM GMT  
Service: iMessage

Nate Barton

So how would it come through allocations

Sent: 06/01/23, 00:12:26 AM GMT  
Service: iMessage

Kunnal Vij

Sorry they are not allocated

Sent: 06/01/23, 00:15:06 AM GMT  
Service: iMessage

Kunnal Vij

Its not fully burdened right

Sent: 06/01/23, 00:15:27 AM GMT  
Service: iMessage

Kunnal Vij

Limited financials right

Sent: 06/01/23, 00:16:17 AM GMT  
Service: iMessage

Ya but it does feel weird to exclude the App Store VP and his team

Sent: 06/01/23, 00:17:40 AM GMT  
Service: iMessage

Nate Barton

And I thought we added them in last year

Sent: 06/01/23, 00:17:53 AM GMT  
Service: iMessage

Kunnal Vij

I don't remember doing it.. we can talk after this

Sent: 06/01/23, 00:19:08 AM GMT  
Service: iMessage

Kunnal Vij

but check with Patrick he doesnt do anything

Sent: 06/01/23, 00:19:34 AM GMT  
Service: iMessage

Kunnal Vij

to allocate... Do you remember who provided the cost LY...

Sent: 06/01/23, 00:19:53 AM GMT  
Service: iMessage

Kunnal Vij

I can reach out

Sent: 06/01/23, 00:19:56 AM GMT  
Service: iMessage

Nate Barton

Today 5:08 PM

Is Matt mktg numbers in the Mktg/adv line?

They are not. Should we add in his numbers?

Yes otherwise it's not a full picture

Please pass them our way

It's not a full investment

It's never a full picture and always limited financials, but we can add in

Please send FY22, FY23, and FY24 by categories we have in the P&L

Delivered

<<Attachment file name: IMG\_3803.png >>

Sent: 06/01/23, 00:20:38 AM GMT

Service: iMessage

Nate Barton

From gladys

Sent: 06/01/23, 00:20:39 AM GMT

Service: iMessage

Nate Barton

You can ping Bob on her team

Sent: 06/01/23, 00:20:46 AM GMT  
Service: iMessage

Nate Barton

she said bob will send

Sent: 06/01/23, 00:21:29 AM GMT  
Service: iMessage

Kunnal Vij

OK thanks... should not change YoYs  
i think

Sent: 06/01/23, 00:22:33 AM GMT  
Service: iMessage

Kunnal Vij

itll be small and Flat

Sent: 06/01/23, 00:22:38 AM GMT  
Service: iMessage

Kunnal Vij

hopefully 😊

Sent: 06/01/23, 00:22:44 AM GMT  
Service: iMessage

Kunnal Vij

I pinged Bob as well

Sent: 06/01/23, 00:29:41 AM GMT  
Service: iMessage

Kunnal Vij

we didnt talk this

Sent: 06/01/23, 00:37:16 AM GMT

Service: iMessage

Kunnal Vij



<<Attachment file name: IMG\_8320.jpeg >>

Sent: 06/01/23, 00:57:44 AM GMT

Service: iMessage

Kunnal Vij

if u want to put this in before Ann  
sends ot Phil

Sent: 06/01/23, 00:58:03 AM GMT

Service: iMessage

Kunnal Vij

i hate the bubbles for the record...

Sent: 06/01/23, 00:58:04 AM GMT

Service: iMessage

Nate Barton

Ok let's leave what we have for now

Sent: 06/01/23, 00:59:04 AM GMT  
Service: iMessage

Nate Barton

And see how tomorrow goes

Sent: 06/01/23, 00:59:08 AM GMT  
Service: iMessage

Nate Barton

And can switch to this likely after

Sent: 06/01/23, 00:59:13 AM GMT  
Service: iMessage

Kunnal Vij

Liked "And can switch to this likely after"

Sent: 06/01/23, 00:59:24 AM GMT  
Service: iMessage

Nate Barton

9:15 ok?

Sent: 06/01/23, 03:53:49 AM GMT  
Service: iMessage

Kunnal Vij

yup

Sent: 06/01/23, 04:14:36 AM GMT  
Service: iMessage

Nate Barton

Bob just sent P&amp;L numbers

Sent: 06/01/23, 16:44:21 PM GMT  
Service: iMessage



Nate Barton

Although I guess they have locked  
the deck for the preso today

Sent: 06/01/23, 16:45:00 PM GMT  
Service: iMessage

Nate Barton

We can incorporate next round

Sent: 06/01/23, 16:45:05 PM GMT  
Service: iMessage

Nate Barton

Small \$'s anyways

Sent: 06/01/23, 16:45:09 PM GMT  
Service: iMessage

Kunnal Vij

Yup

Sent: 06/01/23, 16:45:10 PM GMT  
Service: iMessage

Kunnal Vij

Just was that... its ok... you can say  
it includes it 🤔

Sent: 06/01/23, 16:45:24 PM GMT  
Service: iMessage

Kunnal Vij

with all other mumbo jumbo this is a  
small variance 😊

Sent: 06/01/23, 16:45:35 PM GMT  
Service: iMessage

Yep

Sent: 06/01/23, 16:45:40 PM GMT  
Service: iMessage

Kunnal Vij

Slides done

Sent: 06/01/23, 16:48:11 PM GMT  
Service: iMessage

Kunnal Vij



&lt;&lt;Attachment file name: IMG\_0825.jpeg &gt;&gt;

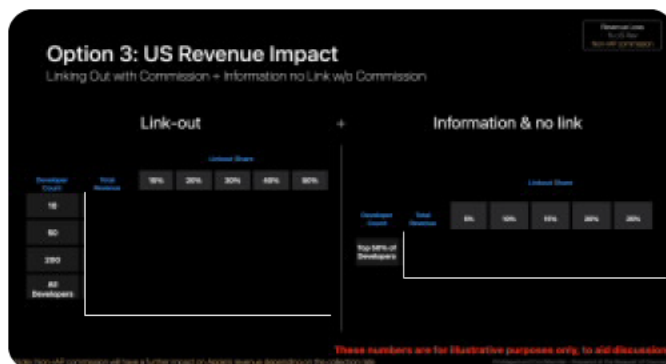
Sent: 06/01/23, 16:48:16 PM GMT  
Service: iMessage

Kunnal Vij

Breakage one^

Sent: 06/01/23, 16:48:25 PM GMT  
Service: iMessage

Kunnal Vij



&lt;&lt;Attachment file name: IMG\_0541.jpeg &gt;&gt;

Sent: 06/01/23, 16:48:51 PM GMT

Nate Barton

Should we revert back white number  
to \$M?

Sent: 06/01/23, 16:52:25 PM GMT  
Service: iMessage

Nate Barton

Don't love the decimals on the top left  
box

Sent: 06/01/23, 16:52:29 PM GMT  
Service: iMessage

Nate Barton

Why do we say Top 50% of  
developers vs. just 50% of  
developers

Sent: 06/01/23, 16:53:06 PM GMT

Kunnal Vij

the b billing mix is is not straight forward

Sent: 06/01/23, 16:53:26 PM GMT

Service: iMessage

Nate Barton

We know only 50% of top ones have it

Sent: 06/01/23, 16:53:40 PM GMT

Service: iMessage

Kunnal Vij

it varies based on how you rank them

Sent: 06/01/23, 16:53:40 PM GMT

Service: iMessage

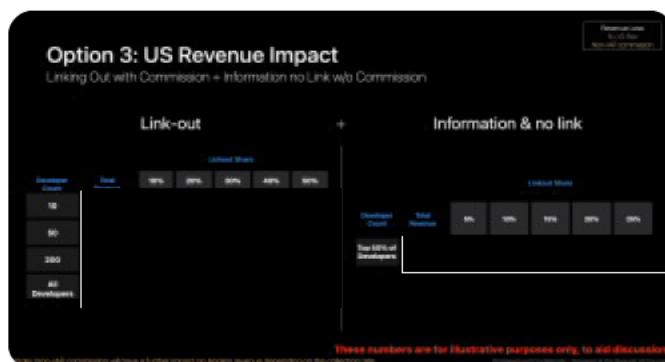
Kunnal Vij

precisely why top 50%.. long tail doesn't not have it

Sent: 06/01/23, 16:54:02 PM GMT

Service: iMessage

Kunnal Vij



&lt;&lt;Attachment file name: IMG\_8650.jpeg &gt;&gt;

Sent: 06/01/23, 16:54:59 PM GMT

Service: iMessage

Kunnal Vij

Done ie converted back to M

Sent: 06/01/23, 16:55:04 PM GMT

Service: iMessage

Kunnal Vij

Did you take put the collection risk  
callout?

Sent: 06/01/23, 16:55:58 PM GMT

Service: iMessage

Kunnal Vij

I dont see it anymore

Sent: 06/01/23, 16:56:04 PM GMT

Service: iMessage

Kunnal Vij

Sorry ignore.. i see it now 😊

Sent: 06/01/23, 16:56:57 PM GMT

Service: iMessage

Nate Barton

fair point ok

Sent: 06/01/23, 16:57:23 PM GMT  
Service: iMessage

Nate Barton

Can we skip old slide now/

Sent: 06/01/23, 16:57:46 PM GMT  
Service: iMessage

Kunnal Vij

doen

Sent: 06/01/23, 16:58:17 PM GMT  
Service: iMessage

Nate Barton

Chatting with Carson for the the  
information with no link out table, he's  
suggesting we just base it on top 200

Sent: 06/01/23, 17:01:21 PM GMT  
Service: iMessage

Nate Barton

Vs. top 50%

Sent: 06/01/23, 17:01:24 PM GMT  
Service: iMessage

Nate Barton

To be consistent with left table

Sent: 06/01/23, 17:01:29 PM GMT  
Service: iMessage

Not sure if you heard that

Sent: 06/01/23, 17:01:31 PM GMT  
Service: iMessage

Kunnal Vij

heard what?

Sent: 06/01/23, 17:04:10 PM GMT  
Service: iMessage

Nate Barton

You got it

Sent: 06/01/23, 17:04:23 PM GMT  
Service: iMessage

Kunnal Vij

Loved "You got it"

Sent: 06/01/23, 17:04:46 PM GMT  
Service: iMessage



Can you look at voice over on slide 19?

Sent: 06/01/23, 17:11:09 PM GMT  
Service: iMessage

Kunnal Vij

just added 2 words...

Sent: 06/01/23, 17:12:18 PM GMT  
Service: iMessage

Kunnal Vij

all else looks ok..

Sent: 06/01/23, 17:12:23 PM GMT  
Service: iMessage

Kunnal Vij

What is this about?

Sent: 06/01/23, 17:14:16 PM GMT  
Service: iMessage

Nate Barton

Today 9:20 AM

Did you meet him yet?

Yes, Kunnal and I both met him. We like him. We have a pretty solid external candidate and were waiting to hear back about visa issues from recruiting tomorrow. Let me send a text tomorrow to let you know where we are at.

Delivered

Ok, I hope you go internal instead. How do we get in front of these with your org in the future? The other orgs have been prioritizing FDPs when possible given the current situation.

&lt;&lt;Attachment file name: IMG\_0013.png &gt;&gt;

Sent: 06/01/23, 17:14:33 PM GMT

Service: iMessage

Nate Barton

From Audra

Sent: 06/01/23, 17:14:33 PM GMT

Service: iMessage

Kunnal Vij

hahahaha

Sent: 06/01/23, 17:14:57 PM GMT

Service: iMessage

Kunnal Vij

actually i like option 3...

Sent: 06/01/23, 17:20:50 PM GMT

Service: iMessage

Kunnal Vij

its a clear distinction... sets the precedence that the point of inflection is a Link

Sent: 06/01/23, 17:21:23 PM GMT

Service: iMessage

Kunnal Vij

Wow Eddie came out strong on this!!!

Sent: 06/01/23, 17:30:12 PM GMT

Service: iMessage

Nate Barton



Sent: 06/01/23, 17:30:24 PM GMT

Service: iMessage

Nate Barton



Sent: 06/01/23, 17:41:16 PM GMT

Service: iMessage

Kunnal Vij

CC vs USD...

Sent: 06/01/23, 17:41:25 PM GMT

Service: iMessage

Kunnal Vij

and rolling 4 Qtrs...

Sent: 06/01/23, 17:41:35 PM GMT

Service: iMessage

Nate Barton

Do you know

Sent: 06/01/23, 17:45:23 PM GMT  
Service: iMessage

Kunnal Vij

China will drop though... That was  
the other point I wanted to make...  
since its underperforming vs trends...  
itll come to [REDACTED]

Sent: 06/01/23, 17:49:10 PM GMT  
Service: iMessage

Nate Barton

Peaks and valleys

Sent: 06/01/23, 17:51:52 PM GMT

Kunnal Vij

this is FY23 so [REDACTED]

Sent: 06/01/23, 18:04:24 PM GMT

Service: iMessage

Kunnal Vij

We did it last year... size want there...  
last time..

Sent: 06/01/23, 18:05:02 PM GMT

Service: iMessage

Kunnal Vij

[REDACTED] saving per [REDACTED] billing shift

Sent: 06/01/23, 18:05:48 PM GMT

Service: iMessage

Kunnal Vij

will meet i need to convert all people  
that are dormant... and its not true its  
[REDACTED] cost cause we have [REDACTED] cash  
back

Sent: 06/01/23, 18:06:40 PM GMT

Service: iMessage

Kunnal Vij

Here is the breakdown of [REDACTED] Apple  
Card holders in the US: [REDACTED] spend-  
active Apple Card holders (given  
approx. [REDACTED] active rate) [REDACTED] users  
have Apple Card at the top of their  
AMP stack This leaves [REDACTED] users as  
the total addressable audience for  
which we could engage with to make

Apple Card their default payment method. Finance has determined that for every 1 million users we switch from a 3rd party credit card to make Apple Card the default, we save [REDACTED] in interchange fees. Given the LOE required to switch 1 million users - as well as taking into account opportunity costs - we don't believe there is a meaningful opportunity to reduce interchange in the US with Apple Card.

Sent: 06/01/23, 18:15:41 PM GMT  
Service: iMessage

Kunnal Vij

We Dish Dash as you hated BJs 🤔

Sent: 06/01/23, 19:03:50 PM GMT  
Service: iMessage

Nate Barton

Ah man, I love that place

Sent: 06/01/23, 19:04:01 PM GMT  
Service: iMessage

Kunnal Vij

Hahah i can do take out for you..

Sent: 06/01/23, 19:04:18 PM GMT  
Service: iMessage

Nate Barton

I'm good

Sent: 06/01/23, 19:05:37 PM GMT  
Service: iMessage

Nate Barton

Thx though 😊

Sent: 06/01/23, 19:05:41 PM GMT  
Service: iMessage

Nate Barton

Want to still sync?

Sent: 06/01/23, 20:05:53 PM GMT  
Service: iMessage

Kunnal Vij

on with the recruiter...

Sent: 06/01/23, 20:06:10 PM GMT  
Service: iMessage

Kunnal Vij

she called..

Sent: 06/01/23, 20:06:11 PM GMT  
Service: iMessage



Nate Barton

K

Sent: 06/01/23, 20:06:14 PM GMT  
Service: iMessage

Nate Barton

Question

Sent: 06/01/23, 20:29:15 PM GMT  
Service: iMessage

Nate Barton

Why on the option 1 breakage slide  
between 0% and 5% rows the  
numbers don't move much

Sent: 06/01/23, 20:29:29 PM GMT  
Service: iMessage

But move more as you go to 10%  
and beyond?

Sent: 06/01/23, 20:29:35 PM GMT  
Service: iMessage

Kunnal Vij

I dont see a 5% slide?

Sent: 06/01/23, 20:32:57 PM GMT  
Service: iMessage

Kunnal Vij

Ohh sorry I see noe

Sent: 06/01/23, 20:33:29 PM GMT  
Service: iMessage

Kunnal Vij

I think its [REDACTED]

Sent: 06/01/23, 20:34:01 PM GMT  
Service: iMessage

Just rounding? That's my question -  
is it linear

Sent: 06/01/23, 20:34:13 PM GMT  
Service: iMessage

Nate Barton

Doesn't look that way optically with  
the numbers

Sent: 06/01/23, 20:34:19 PM GMT  
Service: iMessage

Kunnal Vij



<<Attachment file name: IMG\_5295.jpeg >>

Sent: 06/01/23, 20:35:05 PM GMT  
Service: iMessage

Kunnal Vij

rounding and since this is Developer  
decisioning model driven a few  
developers drop out as the breakage  
inc...

Sent: 06/01/23, 20:35:29 PM GMT  
Service: iMessage

Kunnal Vij

so that is a subset impact

Sent: 06/01/23, 20:35:35 PM GMT  
Service: iMessage

I guess we're not having this 1:30 mtg?

Sent: 06/01/23, 20:35:56 PM GMT  
Service: iMessage

Kunnal Vij

doesn't seem like it... I can drive over and we can sync again on stuff...

Sent: 06/01/23, 20:36:19 PM GMT  
Service: iMessage

Kunnal Vij

of we can sync on webex.. what ever works

Sent: 06/01/23, 20:36:28 PM GMT  
Service: iMessage

Nate Barton

I think we're in okay position at this point

Sent: 06/01/23, 20:37:32 PM GMT  
Service: iMessage

Kunnal Vij

Loved "I think we're in okay position at this point"

Sent: 06/01/23, 20:44:54 PM GMT  
Service: iMessage

Nate Barton

She joined FYI

Sent: 06/01/23, 20:45:02 PM GMT  
Service: iMessage

But I can cover

Sent: 06/01/23, 20:45:05 PM GMT  
Service: iMessage

Kunnal Vij

I dropped off- shoot

Sent: 06/01/23, 20:45:17 PM GMT  
Service: iMessage

Kunnal Vij

Liked "But I can cover"

Sent: 06/01/23, 20:45:28 PM GMT  
Service: iMessage

Kunnal Vij

Driving now.. thank you

Sent: 06/01/23, 20:45:31 PM GMT  
Service: iMessage

Kunnal Vij

I am sitting in the lobby

Sent: 06/01/23, 21:29:16 PM GMT  
Service: iMessage

Nate Barton

In Jen chow's office

Sent: 06/01/23, 21:30:53 PM GMT  
Service: iMessage

Nate Barton

If you want to come

Sent: 06/01/23, 21:30:56 PM GMT  
Service: iMessage

Nate Barton

She's not here

Sent: 06/01/23, 21:30:57 PM GMT  
Service: iMessage

Kunnal Vij

Liked "In Jen chow's office"

Sent: 06/01/23, 21:31:04 PM GMT  
Service: iMessage

Kunnal Vij

[REDACTED]

Sent: 06/01/23, 21:41:19 PM GMT  
Service: iMessage

How many developers in the US

Sent: 06/01/23, 22:06:28 PM GMT  
Service: iMessage